Module 9

Chapter 5

NAF Mass Actions

Chapter Overview

Introduction	This chapter explains the mass actions available for NAF processing: • Mass Appraisals • Mass Salary • Mass Position Change

Purpose	This section explains how to process NAF mass appraisals for a group of similar appraisals.

Before You Begin	• Use mass appraisals when you want to update multiple records at one time.
	 • When you process NAF mass appraisals, the People Record in HR is updated.
	   • An RPA is not produced as it is with other mass actions.
	   • There is no NPA (Army DA 3434; Air Force AF 2548 equivalent form) generated.
	 • You can export the data from the **Preview** window to an Excel spreadsheet.

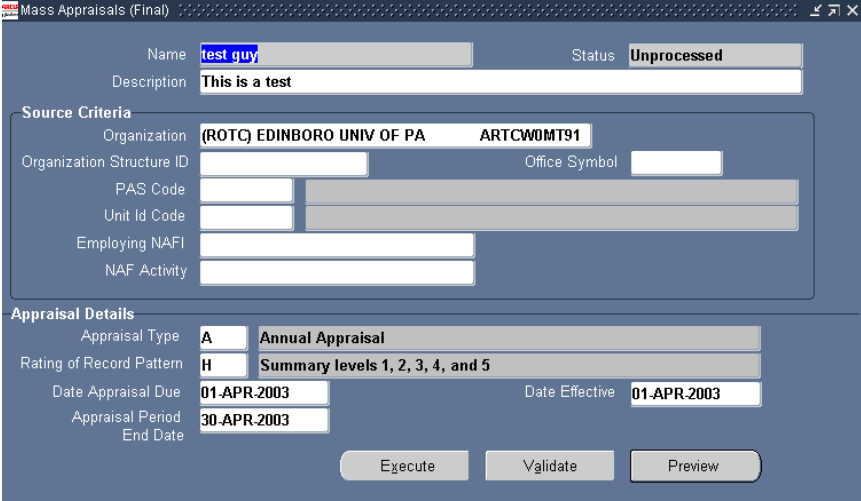|	
Who Does It	The capability to create and execute a mass appraisal is available only in the CIVDOD NAF HR Manager (AF) Role and CIVDOD NAF HR Manager (Army) Role.

Processing NAF Mass Appraisals

Processing a Mass Appraisal

Step	Action
1	**Navigation Path** → *Mass Actions* → *Mass Appraisal* → *Final Mass Appraisals* → **<Open>**. **Notes:** • The **Mass Appraisal (Preview)** window is available as a "rough draft" window. It is exactly like the **Mass Appraisal (Final)** window, but without the **<Execute>**taskflow button. You can create the mass appraisal by clicking either menu item. Mass appraisals can only be processed in the **Final Mass Appraisal** window. • Components may want to use both forms; however, for security reasons, limit the number of personnel who can run the final process.
2	The **Mass Appraisal (Final)** window opens with three taskflow buttons. With your cursor in the *Name* data field, type in a unique name for the appraisal action you are creating. **Note:** The *Status* data field is system-generated to show how far your appraisal has progressed when you save your action; e.g., Unprocessed, Submitted, etc. No action is required.

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Processing NAF Mass Appraisals, Continued

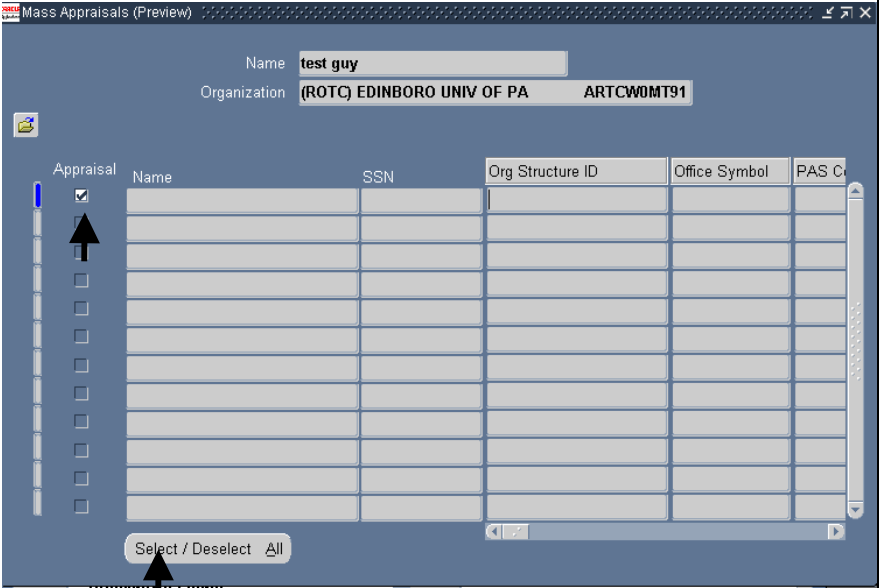**Processing a Mass Appraisal** (continued)

Step	Action
3	- The *Description* data field is free text you type in to describe your action and can accommodate 100 characters. - The **Source Criteria** Region allows you to enter data to define the employees to be included in the Mass Appraisal process. - The *Organization* data field must be completed. - The other data fields merely allow you to further define the select criteria, if desired. - The **Appraisal Details** Region must be completed for US actions, because of OPM CPDF edits. NAF employees are not subject to the edits, however some data fields are required:

Data Field	Description
Appraisal Type	Automatically populates with Code A. You can overwrite it with codes on the LOV.
Rating of Record Pattern	Required for NAF - (Ex: H).
Date Appraisal Due	Required for NAF.
Date Effective	Required for NAF.
Appraisal Period End Date	Required for NAF.

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Processing NAF Mass Appraisals, Continued

Previewing Your Action

Clicking the <**Preview**> button on the **Mass Appraisals (Final)** window opens the **Mass Appraisals (Preview)** window. Based on the information input in the Source Criteria on the previous window, employees are identified and displayed in alphabetical order, along with their SSAN. The names for the mass appraisal can be viewed and selected or deselected. Follow the steps below to preview the action.

Step	Action
4	On the **Mass Appraisals (Final)** window, click the **<Preview>** button The **Mass Appraisals (Preview)** window opens with data elements populated from the previous window. **Note:** The check mark in the **Appraisal** checkbox indicates the name on the line next to it is included in the mass appraisal action. Deselect the check mark if the name is <u>not</u> to be included. • If a large number of names appear on the window, but only a few are to be included: • Click the <**Select/Deselect All**> button to remove the check mark from the checkboxes. • Select the names to be included by individually placing a check mark in the checkbox next to the names.

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Processing NAF Mass Appraisals, Continued

Previewing Your Action (continued)

Step	Action
4 Cont	The **Appraisal** checkbox opens next to the *Name* and *SSN* columns. You can scroll through the remaining columns with the *Name* and *SSN* always visible as shown above. Information may or may not populate the columns depending if it is stored in the record. The remaining columns on the **Preview** Window contain data for all components. You are only required to complete the data necessary to comply with your business rules, i.e., ***Target Rating of Record*** – where you actually enter the rating (1-5). The columns are provided below with annotations. (N/A) means not required for NAF.

	Columns	Columns
	Org Structure ID	**Target Bonus Indicator (Demo)** (N/A)
	Office Symbol	**Target Bonus Reason (Demo)** (N/A)
	PAS Code (Air Force only)	**Target Appraisal Type** (Since user can overwrite the default code in the Appraisal Details, it may vary among selected records.)
	PAS Code Description (Air Force only)	**Target Rating of Record** (Required input from LOV)
	Unit Id Code (Army only)	**Target Rating of Record Level** (N/A)
	Unit Id Code Description (Army only)	**Target Rating of Record Pattern** (Enter 1 through 5)
	Employing NAFI	**Target Factor (AF)**
	NAF Activity (AR)	**Target Date Appraisal Due**
	Pay Plan	**Target Date Effective**
	Pay Plan Description	**Target Appraisal Period End** (N/A)
	Grade	**Date, and Comments** (free form for your use only - Optional)
	Performance Constraint Indicator (Demo) (N/A)	
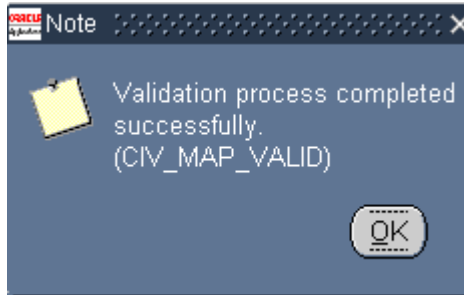
Processing NAF Mass Appraisals, Continued

Previewing Your Action (continued)

Step 🖎	Action
5	Click the **<Validate>** button to run the business rules for the process and identify any errors that occurred.
	• You can check the Process Log to determine if errors or warnings occurred, and make any necessary corrections.
	• The business rules in effect for individual update of a record (direct update of the SIT) also apply to the mass process.
6	Click the *Save* icon and exit the window to return to the **Mass Appraisals (Final)** window.

Validating the NAF Mass Appraisal

Clicking the <**V**alidate> button on the **Mass Appraisals (Final)** window opens a Message Box. Click the<**V**alidate> button after Preview has been completed to ensure there are no rejects before Executing the action.

Step	Action
7	Click the**<Validate>** button on the **Mass Appraisals (Final)** window to display a Message Box with the following "Validation process completed successfully." Click the **<OK>** button**.**
8	If an Error occurs a Message Box opens indicating the required items that have not been entered. **Note:** Air Force requires the *Target Factor* column to be completed otherwise, an error will occur.
9	Correct the actions on the **Mass Appraisals (Preview)** window, save your action, and return to the **Mass Appraisals (Final)** window.

Processing NAF Mass Appraisals, Continued

Executing the   Follow these steps to execute the mass appraisal and update the database.
Mass Appraisal

Step	Action
10	Click the**<Execute>** button on the **Mass Appraisals (Final)** window a Message Box appears stating "Mass Appraisals Final Process successfully submitted."
11	Click the**<OK>** button. The **Mass Appraisals (Final)** window opens. **Note:** Once your have "Executed" or "Processed" the action: - A new row of data is entered into each employee's record if the record validated. - The taskflow buttons (**Ex<u>e</u>cute**, **<u>V</u>alidate**, and **<u>P</u>review**) are grayed out.

Processing NAF Mass Salary

Purpose	This section explains how to process NAF mass salary for **Pay Adjustment.**

Before You Begin	• Use mass salary when you want to update multiple records at one time for Pay Adjustment - **NOA Code A894 (Army); N894 (AF).** • When you process NAF mass salary, the People Record in HR is updated. • RPAs are produced if required. • ZZZ is used for Legal Authority Code for NAF pay actions. • You can export the data from the **Preview** Window to an Excel spreadsheet.
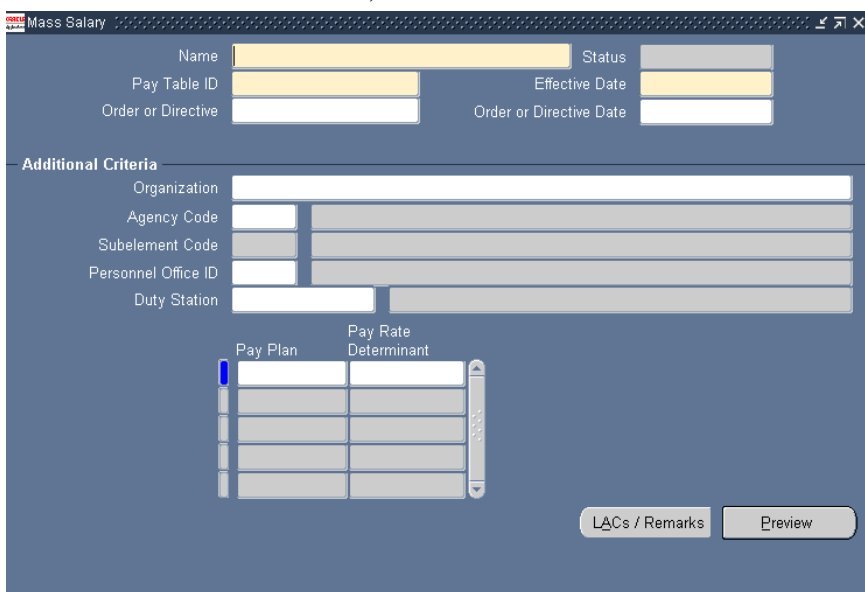
Who Does It	The capability to create and execute a mass salary is available only in the CIVDOD NAF HR Manager (AF) and CIVDOD NAF HR Manager (Army) responsibility.

Processing NAF Mass Salary
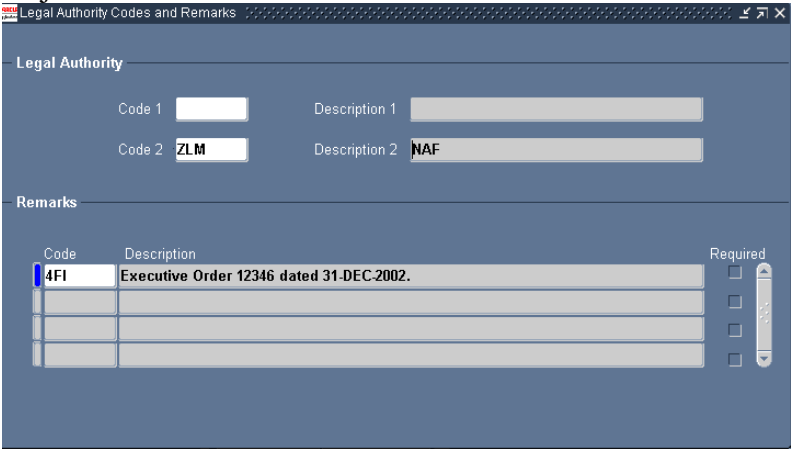
Processing a NAF Mass Salary

Step	Action
1	**Navigation Path** → *Mass Actions* → *Mass Salary* → *Preview Mass Salary* → **\<Open\>**. **Note:** • The **Mass Salary** window is available as a "rough draft" window. It is exactly like the **Mass Salary (Final)** window, You can create the NAF Mass Salary by clicking either menu item. Mass Salary can only be processed in the **Mass Salary (Final)** window. • Components may want to use both forms; however, for security reasons, limit the number of personnel who can run the final process.
2	The **Mass Salary (Preview)** window opens with two taskflow buttons: \<**LACs/Remarks**\>, and \<**Preview**\>.
3	With your cursor in the *Name* data field, type in a unique name for the mass salary action you are creating. **Note:** The *Status* data field is system-generated to show how far your mass salary has progressed when you save your action; e.g., Unprocessed, Submitted, etc. No action is required.
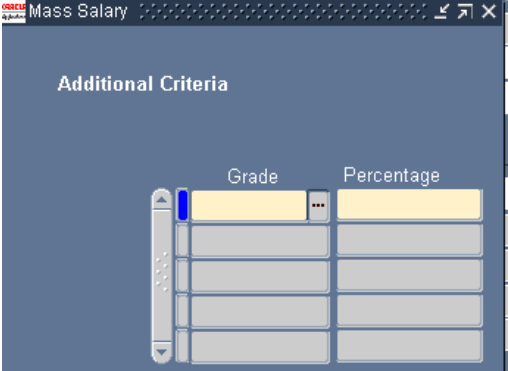
Processing NAF Mass Salary, Continued

Processing a NAF Mass Salary (continued)

Step	Action
4	Click the **<Preview>** button, Input a Unique Name, input pay table ID and Effective Date and any other Criteria needed for the preview.
5	Click the <LACs/Remarks> button. In Authority Code input ZLM with an insert of NAF and input any remarks needed for the Pay Adjustment. Save an Exit window.
6	Enter data in the remaining data fields: • *NOAC Code* • *Pay Table ID* • *Effective Date* • **Additional Criteria** Area allows you to enter data to define the employees to be included in the Mass Salary process. • You must enter *Pay Plan*, e.g., CC, NF**,** and *Pay Rate Determinant.* **Note:** If you need to limit the select process, use the following data fields to enter information: • *Organization* • *Personnel office ID* • *Agency Code/Subelement* • *Duty Station*
7	Click the *Save* icon
8	Click the Zoom icon to Enter the *Grade* and *Percentage* in the appropriate column based on pay plan and grade.

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Processing NAF Mass Salary, Continued

Step	Action
9	If you are processing Mass Pay on Payband employees you will need to select the view/zoom and add the Pay Plan/grade and percentage. This is only needed if processing a mass pay on pay band employees NF and CC. This window can only be accessed after the input of the LACs/Remarks. If the process is for wage employees, the View/Zoom is not used.

Processing NAF Mass Salary, Continued

Previewing Your Action

Clicking the <**Preview**> button on the **Mass Salary (Final)** window
Based on the information input in the **Additional Criteria** on the previous
window, employees are identified and displayed in alphabetical order, along
with their SSAN.

- The names for the Mass Salary can be viewed and selected or
  deselected.

Follow the steps below to preview the action.

Step	Action
	On the **Mass Salarys (Final)** window, click the **<Preview>** button. The window opens with data elements populated from the previous window. Employee Names with SSNs and additional information display based on your selection criteria.
	The **Mass Salary** checkbox opens next to the *Name* and *SSN* columns. You can scroll through the remaining columns with the *Name* and *SSN* always visible. Information may or may not populate the columns. The remaining columns are provided below with annotations

		Columns	Columns
		Agency	**Total Old Salary**
		Agency Description	**Total New Salary** (Manual calculation required by Germany and Italy; and countries that use Pay Table 0000,(Turkey)
		POI	**Old Basic Salary**
		POI Description	**New Basic Salary**
		Duty Station	**Org Identified**
		Duty Station Description	**Dt Last Equivalent**
		Pay Plan	**Old WGI Due**
		Pay Plan Description	**New WGI Due**
		Grade	**Pay Plan**
		Step	**WGI Pay Date**
		New Step	**1st Pay Supp Type**
		PRD (Pay Rate Determinant)	**1st Old Supp**
		PRD Description	**1st New Supp**
		New Step (For NAF 893 – WGI)	**1st Old Supp PCT**
		To PRD (Required if different from existing PRD)	**1st New Supp PCT**
		To PRD Description (See previous column)	**2nd thru 10th Supp Type** continues
		Comments (free text)	

Processing NAF Mass Salary, Continued
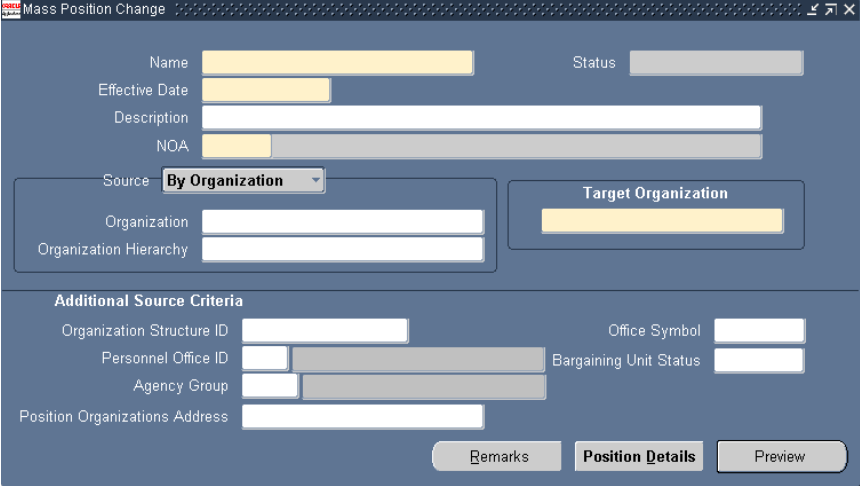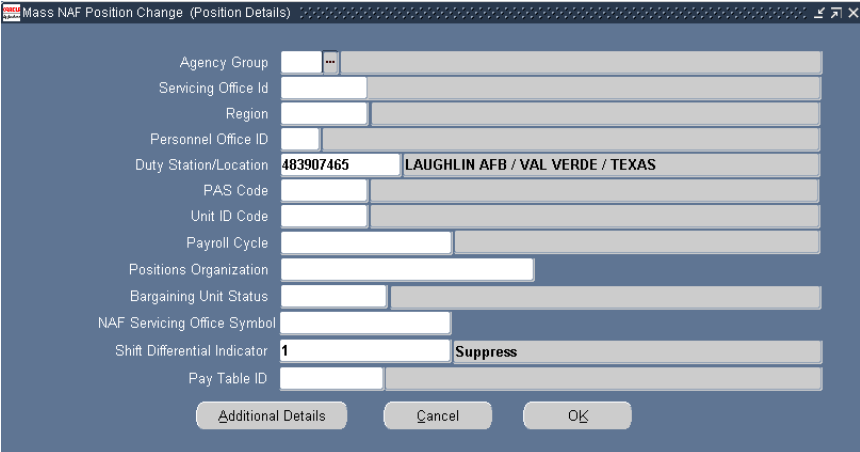
Previewing Your Action (continued)

Step	Action
10	Click the *Save* icon and exit the window to return to the **Mass Salary (Final)** window.
11	Click the **<Execute>** button on the **Mass Salary (Final)** window a Message Box will appear stating "Mass Salary Final Process successfully submitted."
12	Click the**<OK>** button The **Mass Salary (Final)** window opens.
13	Click the *Save* icon. To view the data in the **Entry Values**, navigate to: **People → Enter and Maintain → Assignment → Entries → Element Name → Entry Values**.) **Note:** Once your have "Executed" the action, a new row of data is entered into each employee's record on the Mass Salary effective date.
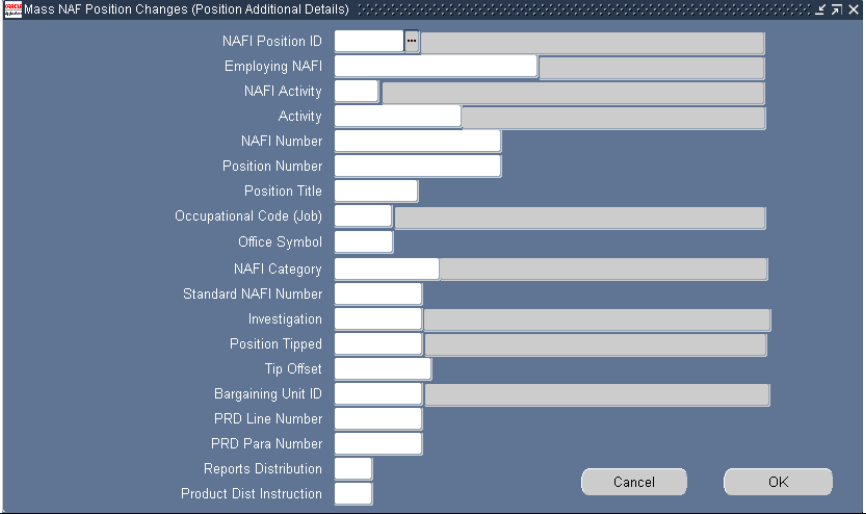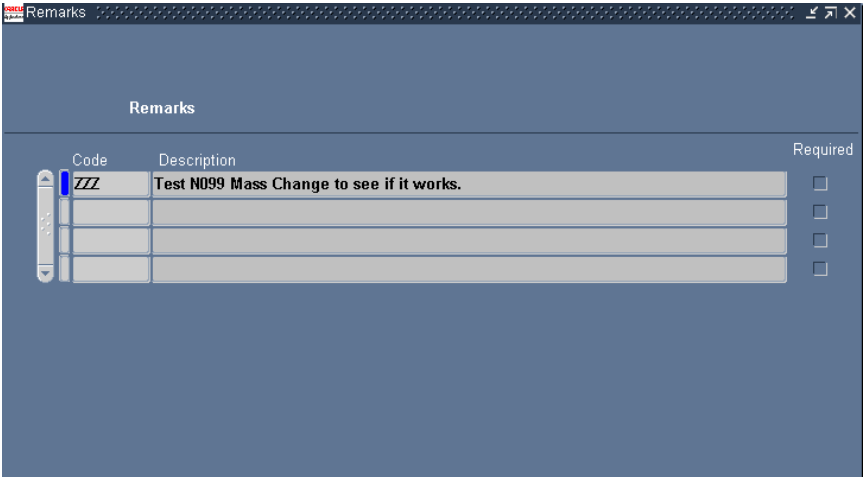
Processing NAF Mass Salary

Step	Action
1	**Navigation Path** → *Mass Actions* → *Mass Position Change* → *Preview Mass Position Change* → **\<Open\>**.
2	Position Details

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Processing NAF Mass Salary, Continued
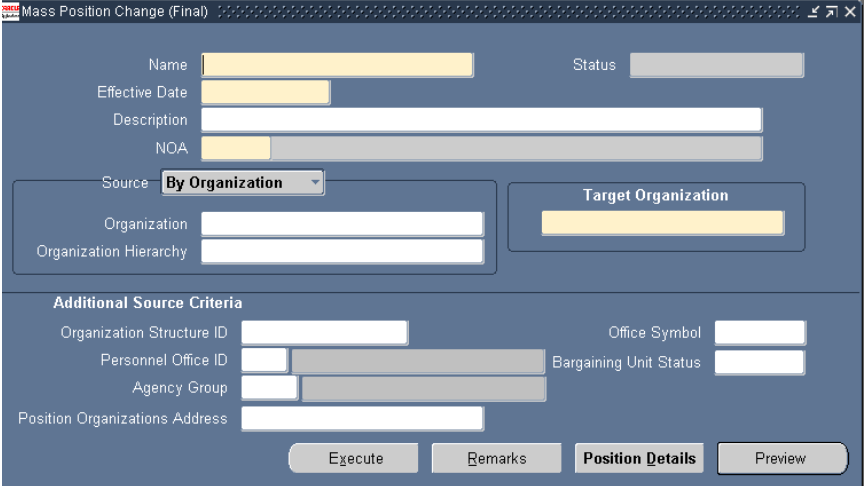
Step	Action
3	Additional Details
4	Remarks

Processing NAF Mass Salary, Continued

Step	Action
5	Preview

Processing NAF Mass Salary

Step	Action
1	**Navigation Path** → *Mass Actions* → *Mass Position Change* → *Final Mass Position Change* → **\<Open\>**.
2	The Mass Position Change Final window opens, and looks the Preview window with the exception the Final window has an Execute button

NEEDS TO BE COMPLETED